

PREPARE + PROSPER

WORKING TOWARD A BRIGHTER FINANCIAL FUTURE

CUSTOMER SUPPORT VOLUNTEER (CSV) VOLUNTEER POSITION DESCRIPTION

THE ROLE

Customer Support Volunteers work closely with the tax site manager and other volunteers to keep the multi-step process of providing high quality tax preparation and related financial services running smoothly. They are the first people customers interact with when they arrive at a tax clinic. Customer Support Volunteers also make tax time a money moment by having conversations about financial topics, promoting savings, and making referrals to trusted partners. Develop new skills and gain valuable experience working with diverse customers, volunteers, and staff. No tax experience needed.

RESPONSIBILITIES + SKILLS

Responsibilities of the role

- Welcome customers to the tax clinic and perform initial customer intake by providing paperwork and answering questions
- Promote savings and Prepare + Prosper's tax refund savings contest
- Have conversations about money and offer support and resources, such as new direct deposit options and referrals to financial coaching
- Assist customers with reviewing information and signing forms at the end of their appointment
- Maintain customer confidentiality, providing as much privacy as possible
- Work cooperatively with P+P staff and other volunteers to provide high-quality service

Skills required

- Eagerness to effectively communicate with and engage with customers
- Ability to prioritize and adapt in a fast-paced environment
- Enjoy working in a racially and socio-economically diverse environment
- Comfort talking to customers about personal finance topics like savings, banking, and credit (*Prepare + Prosper provides training on these topics*)
- Ability to respect customers' financial decisions and actions without judgement
- Computer proficiency
- English proficiency required; additional language proficiency desired but not required

COMMITMENT

- Attend an info session to learn all about P+P and the details of volunteering
- Complete 7-8 hours of training to prepare for your volunteer role
- Volunteer for one four-hour shift per week from June-August (with flexibility when needed!)

Attend one of our May information sessions. See dates and details in the application.

[Click Here to Apply!](#)